

Appointment Change Action - Transfer

PA40

Change History

Update the following table as necessary when this document is changed:

Date	Name	Change Description
11.12.04	Emilie Miller	Edit 1
11.17.04	Emilie Miller	Edit 2
11/01/05	Chylynn Hansel	Training Updates
6/2/06	Chylynn Hansel	Update
6/8/06	Chylynn Hansel	Edits
7/7/06	Chylynn Hansel	Edits
8/1/2006	Chylynn Hansel	Edits

Purpose

Use this procedure to process an appointment change for an employee who is transferring to a position in their current agency, sub-agency, or in another agency.

Trigger

Perform this procedure when an employee has been appointed to another position.

Prerequisites

- The employee must be active in HRMS.
- There must be a position to appoint the employee in to.

Menu Path

Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions

Transaction Code

PA40

Helpful Hints

If the employee is transferring to another agency, the gaining agency will perform this procedure and contact the losing agency and inform them of the employee's transfer.

The **losing agency** will need to enter/change any remaining master data prior to the **gaining agency** performing the appointment change action.

Example: leave to enter or delete in CATS, garnishments, or anything pending master data for the employee.



IMPORTANT NOTE REGARDING EMPLOYEES ENROLLED IN HEALTH

INSURANCE: When a transfer occurs at any time prior to the end of the month, the **losing** agency is responsible for paying the state share for the entire month. The **gaining** agency will not be billed for state share until the month following the transfer date.

The **losing agency** must enter **401** (transfer out code) in the TRANSFER REASON field, and the last day of the month (the losing agency is responsible for the insurance premiums for the entire month) in the TRANSFER EFF DATE field. Press PF10 to update.

The **gaining agency** must enter the new HOME AGENCY/SUB-AGENCY (this requires that you move the cursor to the home agency field), enter **201** (transfer in code) in the TRANSFER REASON field and the transfer-in date (should always be the first day of the month in which the new agency is responsible for the insurance premiums) in the TRANSFER EFF DATE field. Press F10 to update. This will set the home agency lock to the new agency. Do not update any other fields on this screen until after the transfer transaction. Additional changes to the A.41 screen fields will require a separate transaction.

Contact HCA for more instruction by phone: 360 923-2847 or by email:
helpdesk@hca.wa.gov .










If the employee is transferring in their current agency perform this procedure by your assigned role.

This procedure may require hand-offs to other roles (payroll processor and /or benefits processor) depending on the structure of your agency and your role at your agency.

It is critical if a hand-off is made to another role, that the transaction code **PA40** is used and the “*execute into infogroup*” process is used. This is explained further in this procedure. Using **PA40** will ensure that all required infotypes are completed.

Do not use transaction code **PA30** to complete portions of the appointment change action.

The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

Message Type	Description
Error 	Example:  Make an entry in all required fields. Action: Fix the problem(s) and then click  (Enter) to proceed.
Warning 	Example:  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. Action: If an action is required, perform the action. Otherwise, click  (Enter) to proceed.
Confirmation  or 	Example:  Save your entries. Action: Perform the required action to proceed.

Procedure

1. Start the transaction using the above menu path or transaction code **PA40**.

Personnel Actions


2. As required, complete/review the following fields:


Field Name	R/O/C	Description
Personnel no.	R	The employee unique identifying number. Example: 20000679

3. Perform one of the following:

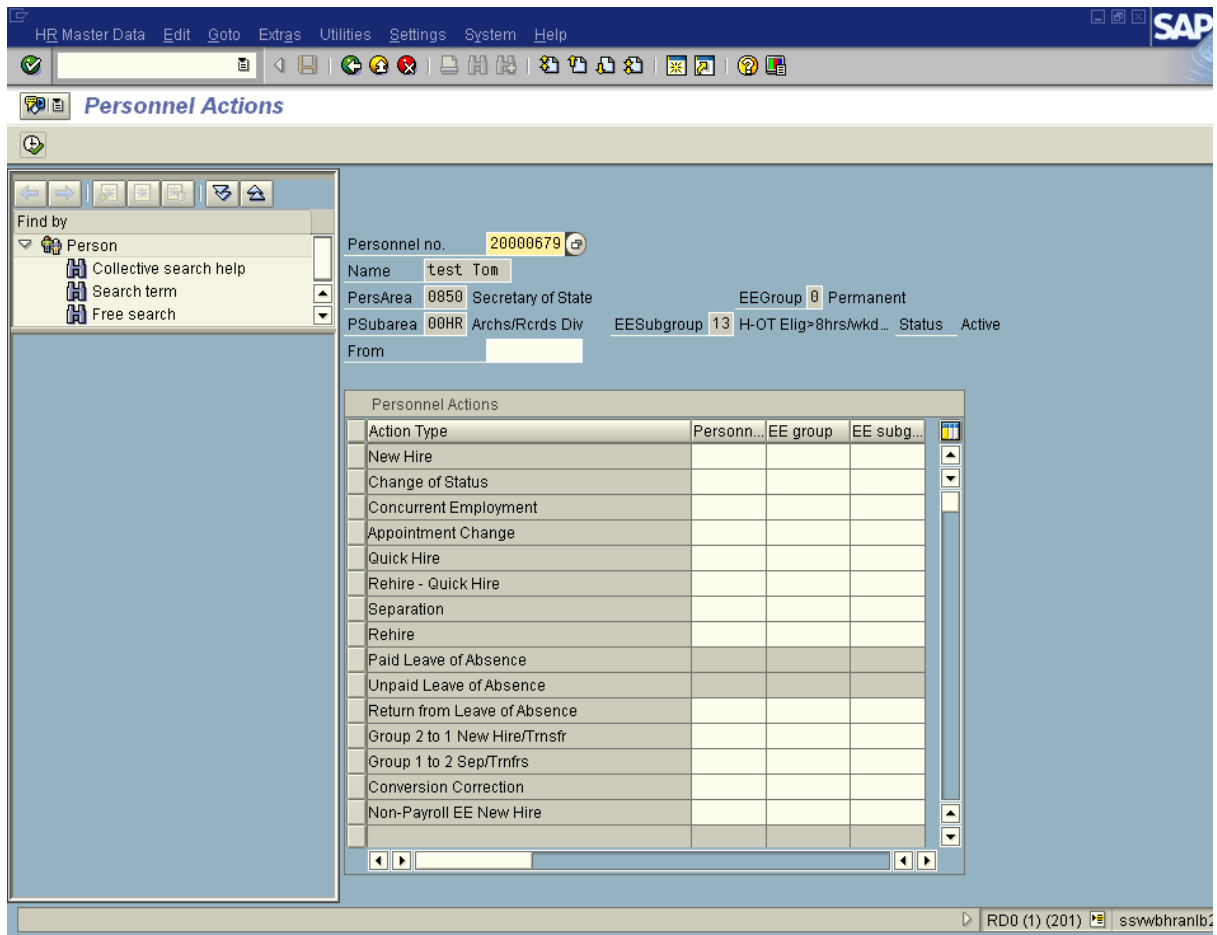
If	Go To
You are the Personnel Administration Processor	Step 4
You are the Payroll Processor	Step 34
You are the Benefits Processor	Step 41


4. Complete the following fields:

Field Name	R/O/C	Description
From	R	<p>The effective date of the appointment change.</p>  <p>Only enter the <i>From</i> date if you are the Personnel Processor initiating the appointment change action.</p> <p>Example: 01/01/2005</p>

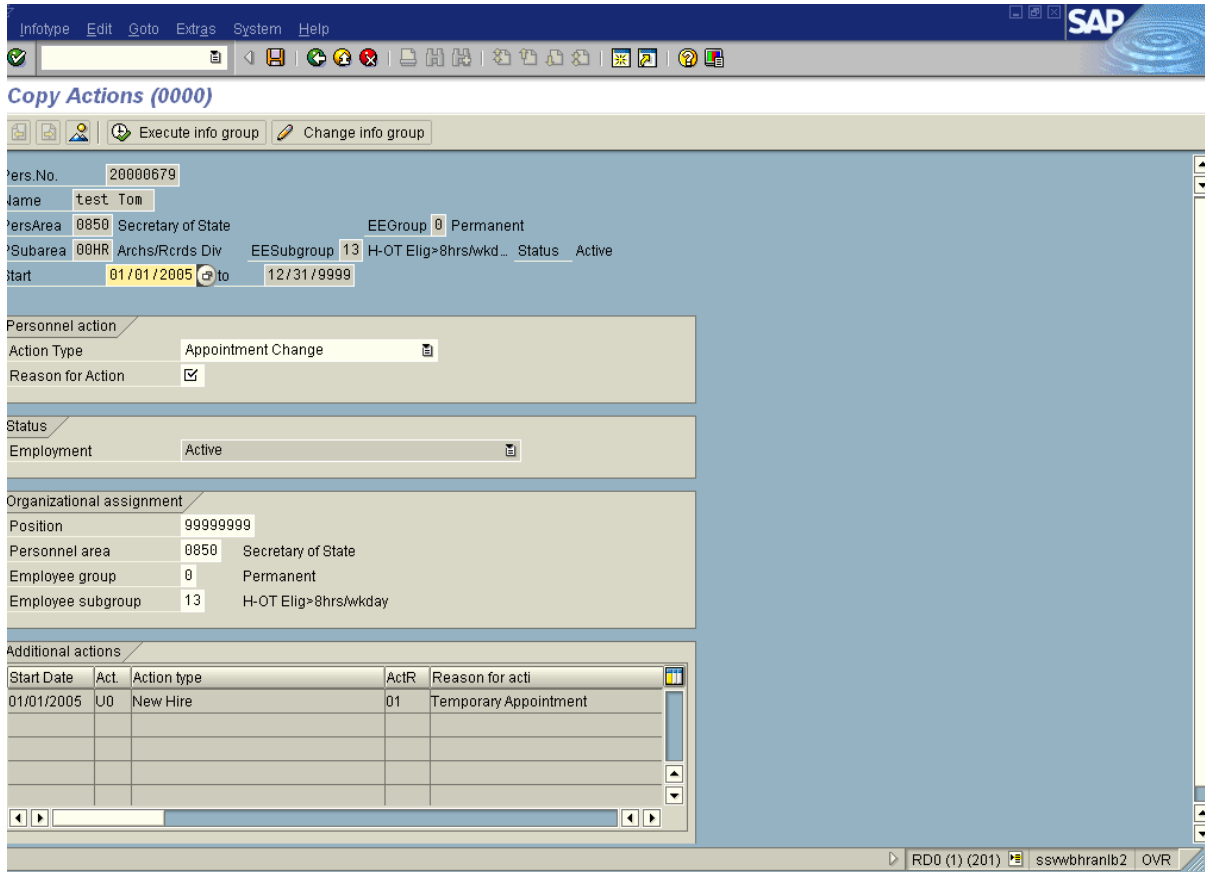
5. Click  (Enter) to validate the information.

Personnel Actions



6. Click on gray box next to Appointment Change .
7. Click  (Execute) to execute a process or action.

Copy Actions



Copy Actions (0000)

Execute info group Change info group

Person No. 20000679
 Name test Tom
 Person Area 0850 Secretary of State EEGroup 0 Permanent
 Subarea 00HR Archs/Rcrds Div EESubgroup 13 H-OT Elig>8hrs/wkd... Status Active
 Start 01/01/2005 to 12/31/9999

Personnel action
 Action Type Appointment Change
 Reason for Action ☒

Status
 Employment Active

Organizational assignment
 Position 99999999
 Personnel area 0850 Secretary of State
 Employee group 0 Permanent
 Employee subgroup 13 H-OT Elig>8hrs/wkday


Additional actions

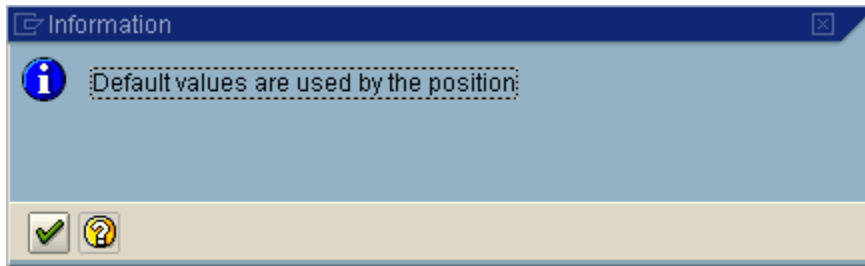
Start Date	Act	Action type	ActR	Reason for acti
01/01/2005	U0	New Hire	01	Temporary Appointment




RD0 (1) (201) sswbhranlb2 OVR

8. As required, complete/review the following fields:

Field Name	R/O/C	Description
Reason for Action	R	The reason for the action. Example: 58
Position	R	The position number. Example: 60000117

9. Click  (Enter) to validate the information.




10. Click  (Copy) to accept.
11. Click  (Enter) to validate the information.
12. Click  (Save) to save.

Copy Organizational Assignment

The screenshot shows the SAP 'Copy Organizational Assignment (0001)' screen. At the top is a menu bar with 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main area is divided into several sections. The top section contains fields for 'Personnel No.' (20000679), 'Name' (test Tom), 'PersArea' (0850 Secretary of State), 'EEGroup' (0 Permanent), 'PSubarea' (00HR Archs/Rcrds Div), 'EESubgroup' (13 H-OT Elig>8hrs/wkd...), 'Status' (Active), 'Start' (01/01/2005), and 'to' (02/15/2005). Below this is the 'Enterprise structure' section with fields for 'CoCode' (WA01 STATE OF WASHINGTON), 'Pers.area' (1050 Office of Financial Mgmt), 'Subarea' (0001 Non Represented), 'Cost Ctr' (1051600 SWFS - DRS), 'Bus. Area' (1050 Office of Financial Manag...), and 'Fund'. The 'Personnel structure' section includes 'EE group' (0 Permanent), 'Payr.area' (11 Semi-monthly), 'EE subgroup' (04 M-OT Elig>Daily Sche), and 'Contract'. The 'Organizational plan' section has 'Percentage' (100.00), 'Position' (70000253 Test Job 2), 'Job key' (50000101 Test Job), 'Exempt' (N), 'Org. Unit' (30000176 Admin Administration), and 'Org.key'. An 'Assignment' button is next to the 'Percentage' field. The 'Administrator' section has fields for 'PersAdmin', 'Time', and 'PayrAdmin'. At the bottom, a status bar shows 'Record created', 'RD0 (1) (201)', 'sswbhranlb2', and 'OVR'.

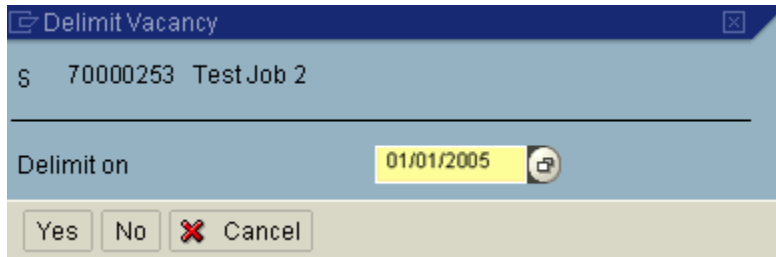
13. Complete the following field:

Field Name	R/O/C	Description
Contract	R	The employee's state status. Example: Probation

14. Click  (Enter) to validate the information.

15. Click  (Save) to save.

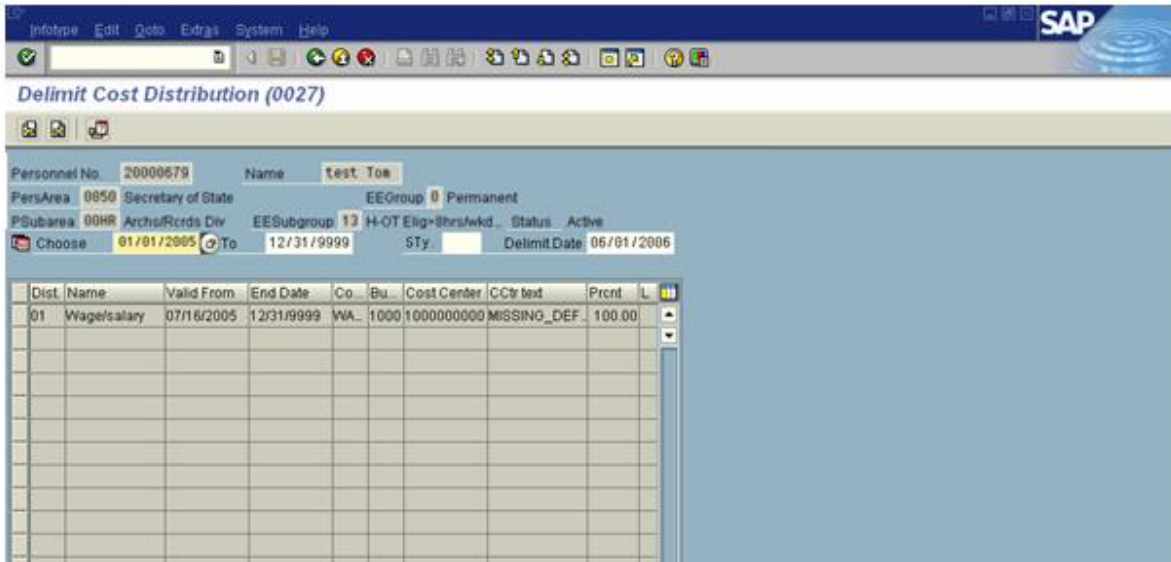
Create Vacancy




This screen will only appear if a vacancy has been created.

16. Click .

Delimit Cost Distribution (0027)



17. Click

01	Wage/salary	07/16/2005	12/31/9999	WA...	1000	10000000000	MISSING_DEF...	100.00	
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18. Click (Delimit).



The Delimit Cost Distribution will only come up if the *Cost Distribution* Infotype (00027) has been created by the losing agency. If this does not come up during the action skip to Step 19.


Change Contract Elements


19. As required, complete/review the following fields:

Description	R/O/C	Description
Start	C	The effective date of the new record. Example: 1/1/2005

Title: Appointment Change Action - Transfer
Processes :
Sub-Processes :

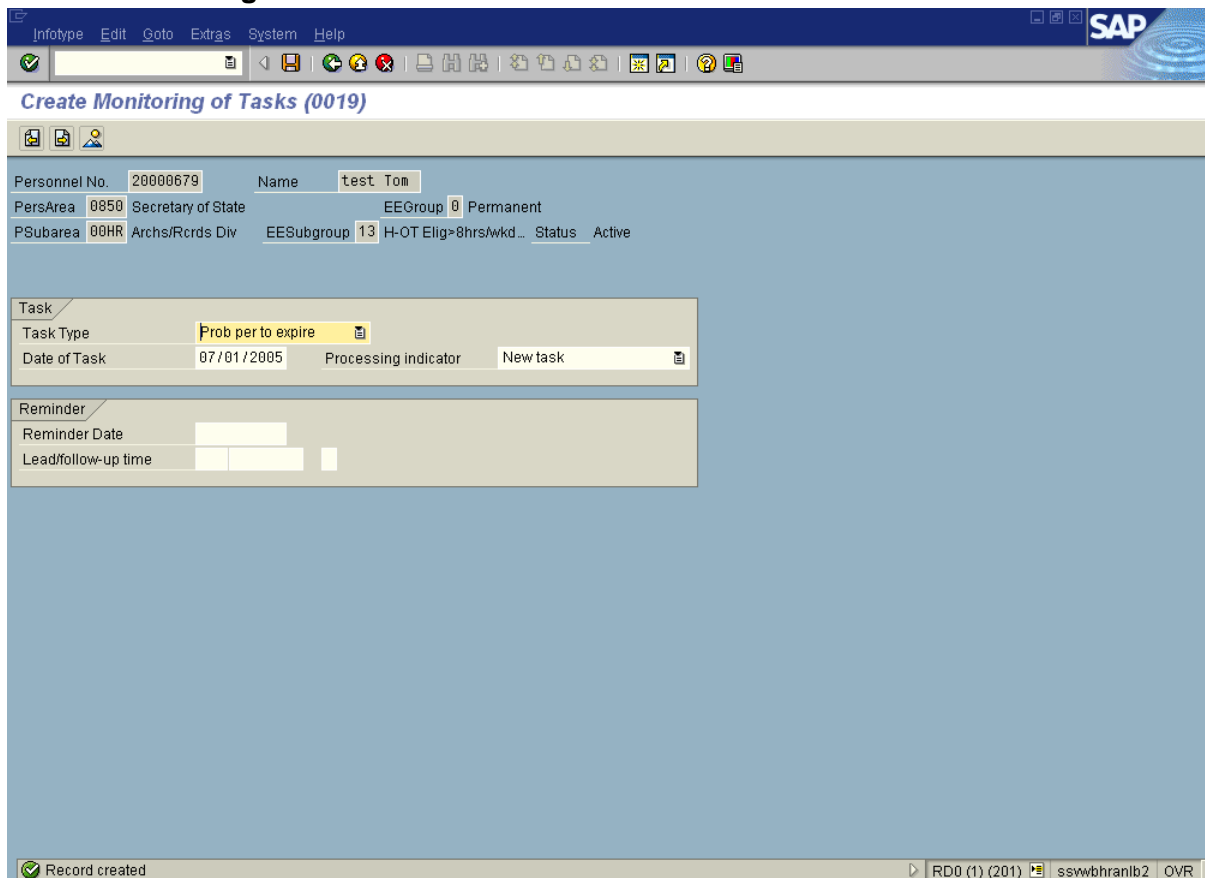
HRMS Training Documents

Description	R/O/C	Description
Contract type	O	The status of employment within the State. It will be either Permanent or Non-permanent. Example: Non-permanent
Probationary period	O	The length of employee's probationary period. <div style="display: flex; align-items: center;">  <p>This field is also used for the length of the employee's trail service period.</p> </div> Example: 6 months

20. Click  (Enter) to validate the information.

21. Click  (Save) to save.

Create Monitoring of Tasks



Create Monitoring of Tasks (0019)

Personnel No. 20000679 Name test Tom

PersArea 0850 Secretary of State EEGroup 0 Permanent

PSubarea 00HR Archs/Rcrds Div EESubgroup 13 H-OT Elig>8hrs/wkd... Status Active

Task

Task Type Prob per to expire

Date of Task 07/01/2005 Processing indicator New task

Reminder

Reminder Date

Lead/follow-up time

Record created

State of Washington HRMS

File name: APPT_CHANGE_ACTION_TRANSF
Version: SME Approved Script
Last Modified: 12/19/2008 11:31:00 AM
 ER.DOC
Reference Number: 26


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The Monitoring of Tasks infotype may not appear based on the chosen contract type. If the infotype does not appear, skip to the Step 22.

22. As required, complete/review the following fields:

Field Name	R/O/C	Description
Task Type	O	A task type is a relevant task that an HRMS user would be expected to perform. Example: Prob per to expire
Date of Task	O	The date on which the task needs to be completed. Example: 12/5/04
Processing indicator	O	This is used to signify if a task entered in the Monitoring of Tasks infotype is new, in process, or has been completed." Example: New Task
Reminder Date	O	The date on which the system should remind you of a certain task. Example: 6/1/2005
Lead/follow-up time	O	The lead/follow-up time defines a period before or after which the system should remind you of a certain task. Example: 1 week

23. Click  (Enter) to validate the information.

24. Click  (Save) to save.

Create Planned Working Time

Create Planned Working Time (0007)

Work schedule

Personnel No. 20000679 Name test Tom

PersArea 0850 Secretary of State EGroup 0 Permanent

PSubarea 00HR Archs/Rcrds Div EESubgroup 13 H-OT Elig>8hrs/wkd Status Active

Start 01/01/2005 To 12/31/9999

Work schedule rule

Work schedule rule FULL

Time Mgmt status 9 - Time evaluation of planned times

☐ Part-time employee Additional time ID

Working time

Employment percent 100.00 ☐ Dyn. daily work schedule

Daily working hours Min. Max.

Weekly working hours 0.00 Min. Max.

Monthly working hrs 0.00 Min. Max.

Annual working hours 0.00 Min. Max.


Weekly workdays

Record created RD0 (1) (201) sswbhra

25. Complete the following fields:

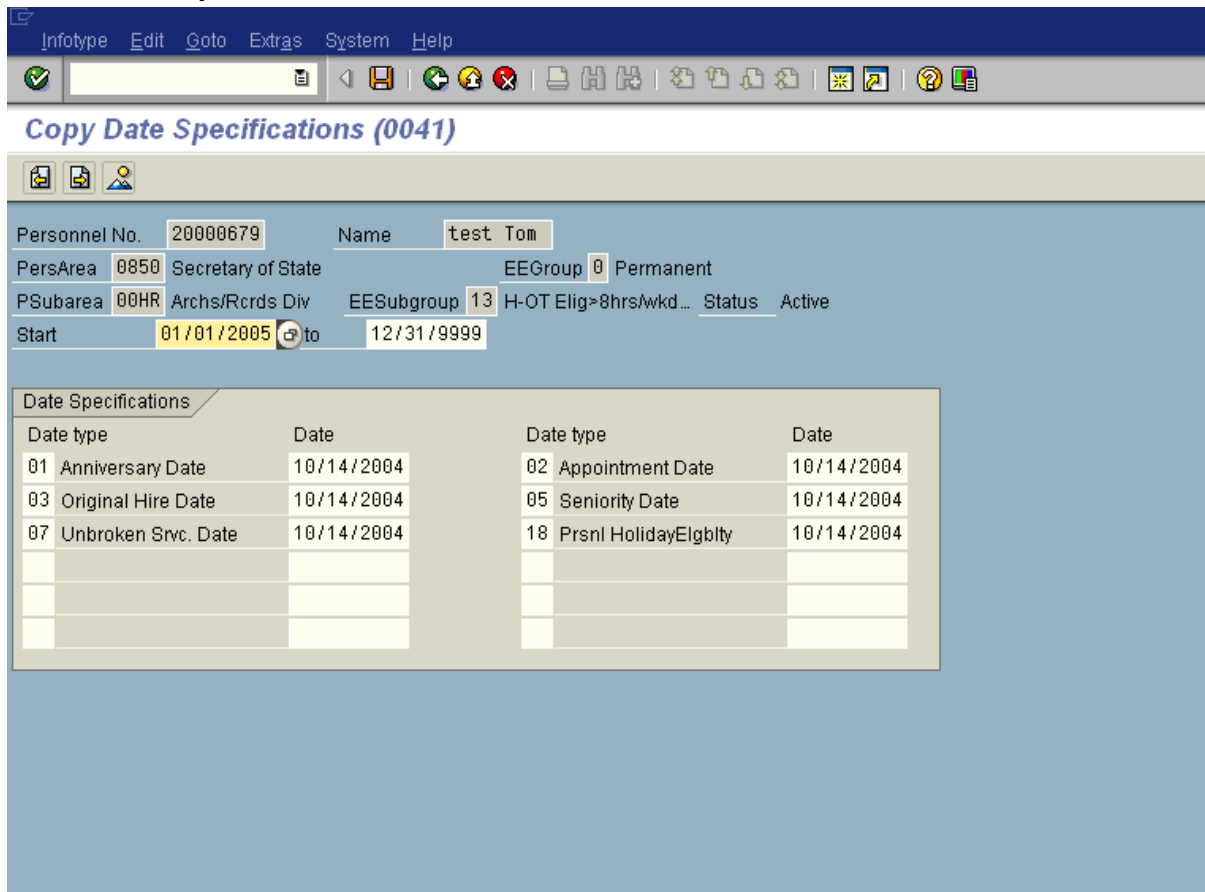
Field Name	R/O/C	Description
Work schedule rule	R	A description of the duration and composition of employee working time for any given workday. Example: FULL
Time Mgmt status	R	The part of the work schedule that an employee is assigned to and signifies how hours are calculated based on the employee's assigned work schedule. Example: 9 – Time evaluation of planned times

Field Name	R/O/C	Description
Additional time ID	C	The indicator on how employee leave will accrue Enter: <ul style="list-style-type: none"> 00 for full normal leave accrual (will default if to normal if field is left blank). 01 for NO leave accrual 02 for sick leave accrual only
Employment percent	O	The amount of time that an employee works per week in a particular position and is described in terms of a percentage. Example: 100.00

26. Click  (Enter) to validate the information.

27. Click  (Save) to save.

Create Date Specifications



Copy Date Specifications (0041)

Personnel No. 20000679 Name test Tom


PersArea 0850 Secretary of State EEGroup 0 Permanent

PSubarea 00HR Archs/Rcrds Div EESubgroup 13 H-OT Elig>8hrs/Awk... Status Active

Start 01/01/2005 to 12/31/9999


Date type	Date	Date type	Date
01 Anniversary Date	10/14/2004	02 Appointment Date	10/14/2004
03 Original Hire Date	10/14/2004	05 Seniority Date	10/14/2004
07 Unbroken Svc. Date	10/14/2004	18 Prsnl HolidayElgblty	10/14/2004


28. Complete the following fields:

Field Name	R/O/C	Description
Original Hire	C	<p>The date the employee starts at an agency.</p> <p> If the Appointment Change is to a new agency this date should reflect the date the employee went to the new agency.</p> <p>Example: 1/1/2005</p>
Appointment Date	R	<p>The effective date of the appointment.</p> <p>Example: 1/1/2005</p>



If necessary, make changes, additions, or deletions to the date specifications.


29. Click  (Enter) to validate the information.


30. Click  (Save) to save.

Create Basic Pay


31. Complete the following fields:

Field Name	R/O/C	Description
Reason	R	This is a specific reason for performing an action or maintaining an infotype. Example: 20
Next Increase	R	The date of the employee's next pay increase. Example: 7/1/2005



32. Click  (Enter) to validate the information.

33. Click  (Save) to save.





For the **Personnel Administration Processor**, this will mark the end of the New Hire action. After saving, click  to exit the action and transfer the New Hire Information Packet to the **Payroll Processor** who will complete the action.




Payroll Processor – Reminder do not put a “From” date in the field prior to executing the transaction (See Step 2). If you entered a “From” date click  (Back) and delete the date and then click  (Execute).

Copy Actions (0000)


34. Click  Execute info group .

35. An information pop up box will appear informing you that “This entry will delete a record.” Click  (Enter) to continue.

36. An Execute info group pop up box will appear informing you that "Warning: Personnel action infotype not saved with 'execute info group' function! Click .




The **Personnel Processor** has already saved this infotype so it is ok to continue.


37. Click  (Next Record) until you reach *Change Add. Withh Info. US* Infotype (0234).

Change Add. Withh. Info. US


38. Complete the following fields:

Field Name	R/O/C	Description
Empl.override group	C	The medial aid code. Example: 0019

39. Click  (Enter) to validate the information



40. Click  (Save) to save.






For the **Payroll Processor**, this will mark the end of the New Hire action. After saving, click  to exit the action and transfer the New Hire Information Packet to the **Benefits Processor** who will complete the action.

Payroll Processor if the employee has recurring payments /deductions, go to **PA30** and follow the procedures Create a Recurring Payment or Create Recurring Deduction.



Benefits Processor – Reminder do not put a “From” date in the field prior to executing the transaction (See Step 2). If you entered a “From” date click  (Back) and delete the date and then click  (Execute).

Copy Actions (0000)

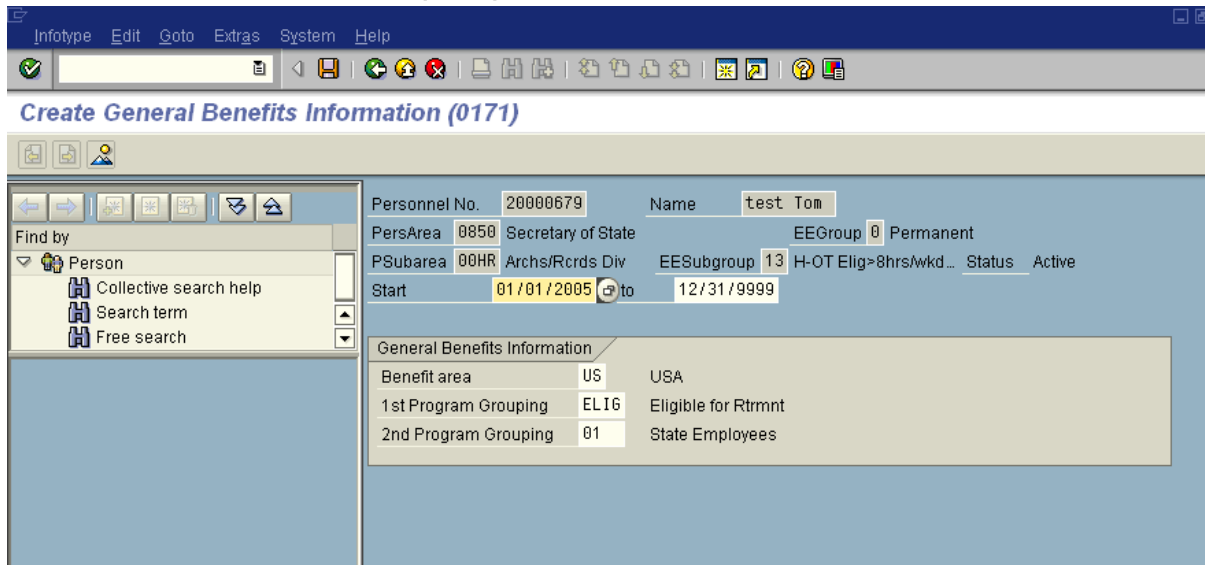
41. Click  Execute info group.
42. An information pop up box will appear informing you that “This entry will delete a record.” Click  (Enter) to continue.
43. An Execute info group pop up box will appear informing you that “Warning: Personnel action infotype not saved with ‘execute info group’ function! Click .



The **Personnel Processor** has already saved this infotype so it is ok to continue.

44. Click  (Next Record) until you reach *Create General Benefits Information* Infotype (0171).

General Benefits Information (0171)



Personnel No.	20000679	Name	test Tom
PersArea	0050 Secretary of State	EEGroup	0 Permanent
PSubarea	00HR Archs/Rcrds Div	EESubgroup	13 H-OT Elig>8hrs/wkd_
Status	Active		
Start	01/01/2005	to	12/31/9999
General Benefits Information			
Benefit area	US	USA	
1st Program Grouping	ELI6	Eligible for Rtrmnt	
2nd Program Grouping	01	State Employees	




The default for the **2nd Program Grouping** is 01- State Employee. Change the grouping if the employee is eligible to participate in a retirement plan other than PERS.

The value in the **2nd Program Grouping** field defaults from appointment information in the *Organizational Assignment* infotype (0001).

You will have to change the **2nd Program Grouping** field if:

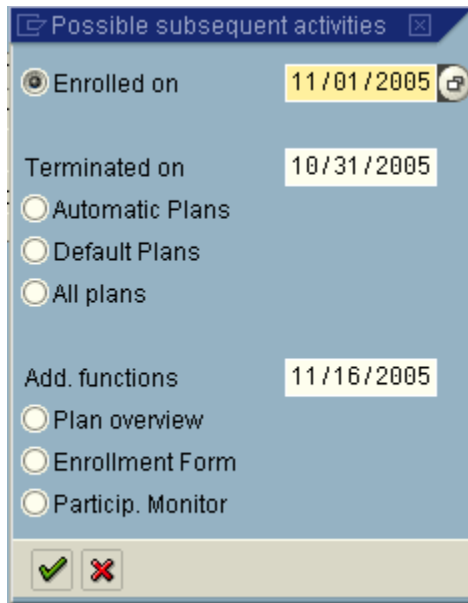
- An employee chooses a different plan.
- The Employee Type defaults to a code not consistent with the System/Plan set up at hiring time.
- An employee changes positions and wants to continue contributing to the System/Plan from his previous position rather than the one that defaults with the new position.

For a list of valid type codes for each retirement system, see [The Employer Handbook - Type Codes](#).

45. Click  (Enter) to validate the information.

46. Click  (Save) to save.

Possible subsequent activities



Possible subsequent activities

☒ Enrolled on 11/01/2005

Terminated on 10/31/2005

☐ Automatic Plans

☐ Default Plans

☒ All plans

Add. functions 11/16/2005

☐ Plan overview

☐ Enrollment Form

☒ Particip. Monitor

☒ ☐

47. Click  to accept.



By using Transaction Code **PA40**, HRMS will identify all plans that the employee is eligible to participate in.

Enrollment

Enrollment

Enroll

Name Smith Robert on 11/01/2005 Overview

Offer selection

Get offer Print form General Notice Error list

Possible offers	Enrollment period
Retirement Enrollmnt	01/01/1800 - 12/31/9999

Offer

Direct selection Selection set

Personnel no. ID number Select

Pers.No. Name

20000769	Smith Robert
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RD0 (1) (201) sswbhtran1b1 OVR

48. Click  Get offer .

Enrollment

49. Click the appropriate Savings Plan.




For a Plan 3 Employee, choose the appropriate plan (PERS, TRS, or SERS0 with the rate option of 0 (zero) during the 90 day choice period. This will place the employee on the 70-day/90-day default report.



If the employee's prior Plan 3 enrollment had a plan choice code on the *Savings Plan* 0619 infotype, this new enrollment must be updated with the same plan choice code.

Maintain Savings Plan



Pers.No. 20000769 Smith Robert

Plan PERS 2

Start 11/01/2005 - 12/31/9999

☐ Stop participation in period

Contribution regular

Pre-tax contribution Semi-monthly

Amount 0.00 USD ☐ Pre-Tax Rollove

Percentage



Units 0 X 0.00 USD

Post-tax contribution Semi-monthly




Amount 0.00 USD ☐ Start Pst-Tax I

Percentage 0.00

Units 0 X 0.00 USD

 Accept 

50. Complete the following field:

Field Name	R/O/C	Description
Percentage	R	<p>This is a field used to store a percentage amount for the retirement deduction.</p> <p> Do not leave this field blank or a retirement deduction will not be taken for the employee. If you do not know the percentage, enter a number and click enter and you will receive a message for the correct percentage to enter.</p> <p> If you do not know the correct plan contribution percentage, HRMS can prompt you. Click in the percentage field and enter any number (example: 2) and press the enter button on your keyboard. You will receive an  Error message in the status bar telling you what the correct contribution percentage is for the selected plan.</p> <p>Example: 2.25</p>

Maintain Savings Plan

Maintain Savings Plan

Pers.No. 20000769 Smith Robert

Plan PERS 2

Start 11/01/2005 - 12/31/9999

☐ Stop participation in period

Contribution regular

Pre-tax contribution Semi-monthly

Amount 0.00 USD

Percentage 2.25


Units 0 X 0.00 USD


Post-tax contribution Semi-monthly


Amount 0.00 USD

Percentage 0.00

Units 0 X 0.00 USD

 Accept



51. Click  Accept.

State of Washington HRMS

File name: APPT_CHANGE_ACTION_TRANSF
Version: SME Approved Script
Last Modified: 12/19/2008 11:31:00 AM
ER.DOC
Reference Number: 26

SAP Parent
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Enrollment

The screenshot shows the SAP Enrollment interface. On the left, under 'Direct selection', the 'Personnel no.' is 20000769 and the 'Name' is Smith Robert. The 'Offer selection' section shows 'Retirement Enrollment' as the selected offer with an enrollment period of 01/01/1800 - 12/31/9999. The 'Retirement Enrollment' table lists various PERS 3 options and rates, all with a status of 'Enroll' and a validity period of 07/01/2005 - 12/31/9999. The 'Enroll' button is highlighted in the bottom right corner of the screen.

Pers.No.	Name
20000769	Smith Robert

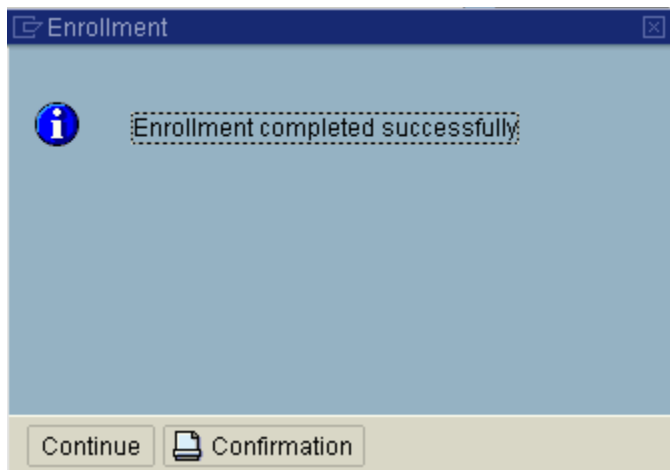
Possible offers	Enrollment period
Retirement Enrollment	01/01/1800 - 12/31/9999

401(a)	Status	Validity period	Activity
PERS 2	Enroll	07/01/2005 - 12/31/9999	✓
PERS 3 - Option 0	Enroll	07/01/2005 - 12/31/9999	
PERS 3 - Rate A - Self	Enroll	07/01/2005 - 12/31/9999	
PERS 3 - Rate A - WSIB	Enroll	07/01/2005 - 12/31/9999	
PERS 3 - Rate B - Self	Enroll	07/01/2005 - 12/31/9999	
PERS 3 - Rate B - WSIB	Enroll	07/01/2005 - 12/31/9999	
PERS 3 - Rate C - Self	Enroll	07/01/2005 - 12/31/9999	
PERS 3 - Rate C - WSIB	Enroll	07/01/2005 - 12/31/9999	
PERS 3 - Rate D - Self	Enroll	07/01/2005 - 12/31/9999	
PERS 3 - Rate D - WSIB	Enroll	07/01/2005 - 12/31/9999	
PERS 3 - Rate E - Self	Enroll	07/01/2005 - 12/31/9999	
PERS 3 - Rate E - WSIB	Enroll	07/01/2005 - 12/31/9999	
PERS 3 - Rate F - Self	Enroll	07/01/2005 - 12/31/9999	
PERS 3 - Rate F - WSIB	Enroll	07/01/2005 - 12/31/9999	


52. Click  Enroll

[illegible]

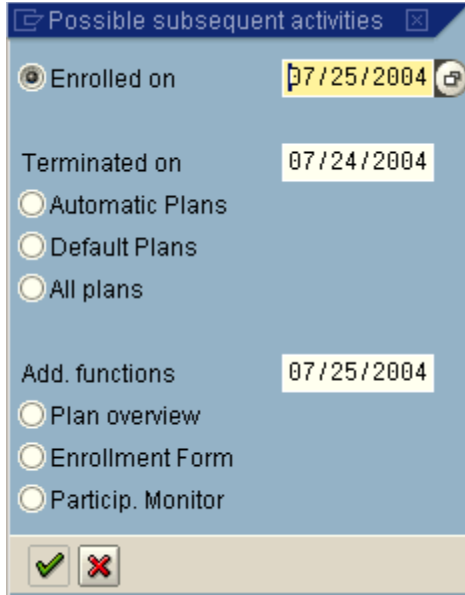
Enrollment



54. Click  to continue or click  to print confirmation.

55. Click  to return to the previous screen. The following screen displays:

Possible subsequent activities



56. Click  to cancel.

57. You have completed this transaction.

58. Click  (Cancel) to return to **PA40**.

59. You have completed this transaction.

Result

You have successfully transferred an active employee from one position to another position.

Comments

Once the Plan 3 employee has submitted their completed DRS member information form designating their Plan 3 contribution rate, see the OLQR procedure [Retirement Plan Choice 90 day selection period, Plan 3 \(Appointment Change\)](#) to complete the retirement choice.